

Poland Road Freight Transport - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 324 pages | Mordor Intelligence

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Report description:

The Poland Road Freight Transport Market size is estimated at 33.4 billion USD in 2025, and is expected to reach 38.05 billion USD by 2030, growing at a CAGR of 2.64% during the forecast period (2025-2030).

Poland's goal to double organic farming by 2030 is expected to increase demand for road freight services

- Poland is the fifth largest manufacturing country in the European Union. Moreover, Poland's automotive production is experiencing significant growth, which is positively impacting related industries. In August 2024, Polish plants produced 22,512 trucks, a 13.8% increase YoY and a 19.2% rise from July 2024. From January to August 2024, total production reached 225,047 vehicles, up by 27,319 units (13% YoY increase). The rise in automotive manufacturing is stimulating the need for components and materials and fueling the demand for road freight transport.
- Polish agriculture has significant potential for growth, supported by modernization, which is required to enhance competitiveness. Moreover, the CAP Strategic Plan for 2023-2027 prioritizes economic, social, and environmental goals in Polish agriculture. The plan includes financial support for struggling sectors, notably livestock, and various crops, while focusing on small and medium-sized farms (up to 300 hectares). In addition, Poland aims to more than double the area dedicated to organic farming by 2030, which is expected to drive the demand for road freight services.

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Rapid growth of transport and storage sector GDP contribution witnessed despite delays in construction of a few projects

- In April 2024, the construction of a highway in Poland faced a year-long delay. This setback came after archaeologists unearthed traces of settlements, some dating back 10,000 years, alongside artifacts from the Bronze and Iron Ages. Poland's General Directorate for National Roads and Motorways (GDDKiA) revealed that these significant discoveries occurred at two sites near the village of Jawiszowice. The findings emerged during the ongoing work on the S1 expressway in the southern Malopolska province.
- In July 2024, Poland's GDDKiA announced an investment of USD 4.74 billion for road development, upgrades, and maintenance throughout the year. Among the recent contracts awarded, GDDKiA has greenlit a 17 km segment of the S17 expressway, valued at USD 192.36 million. Furthermore, a separate package worth USD 140.60 million has been allocated for roadworks in West Pomerania. Upcoming projects include the Rusinov Ring Road and a segment of the S10 Cybowo-Lowicz Walecki Expressway. These undertakings, which encompass the construction of 16 bridges, aim to alleviate local traffic delays and are slated for completion in 2028.

Growing fuel pricing trend witnessed with stabilization expected due to discovery of oil field in the country

- In September 2024, PKN Orlen, Poland's largest refiner and energy firm, unearthed a significant oil field in western Poland. Located in the Lubuskie region, the newly discovered oil field sits adjacent to the existing Rzeczyca field, which boasts reserves of 100,000 metric tons of oil. Collectively, the entire complex is now projected to contain 500,000 metric tons of oil. Once fully developed, the site is set to yield an annual production of 16,500 metric tons of oil. Preliminary tests at the site suggest a strong likelihood of additional oil deposit discoveries. This development is anticipated to curtail Poland's fuel imports in the future.
- The new tariff regarding fuel transmission has recently been under discussion, and Tariff No. 1/2025, will take effect on January 1, 2025. The President of the Energy Regulatory Office approved it on June 3, 2024. This tariff applies to the transmission of gaseous fuels through the Polish section of the Yamal-Europe Transit Gas Pipeline. The tariff rates will be valid from January 1, 2025, at 6:00 a.m. until January 1, 2026, at 6:00 a.m. It aims to stabilize fuel prices in Poland.

Poland Road Freight Transport Industry Overview

The Poland Road Freight Transport Market is fragmented, with the major five players in this market being Deutsche Bahn AG (including DB Schenker), Girtka, Raben Group, Rhenus Group and ROHLIG SUUS Logistics SA (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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